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Working Effectively with Support | Oracle Field Service

Oracle Support Essentials

Oracle Support Training & Education

Safe harbor statement

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Learning Objectives

Start working with Oracle Support through the Oracle Service Cloud Support Portal

Understand when and how to use Service Requests to get assistance

Utilize the resources and tools available to be more proactive and minimize the need to log a Service Request

Agenda

1 **Oracle Field Service Support - Terms and Acronyms**

2 Engaging Support and using the Support Portal

3 Oracle Field Service - Best Practices

4 Oracle Field Service - Resources

5 Additional resources, links and policy documentation

Terms & Acronyms

Terms to know	
Oracle Service Cloud (also referred to as OSvC)	Web Support Portal to access Knowledge Base, Communities, and Service Requests for Oracle Field Service information. https://cx.rightnow.com
Oracle Field Service (OFS)	Field Service Management solution within Service Cloud suite. Formerly known as ETAdirect by TOA Technologies.
Service Request (SR)	Request for technical assistance on Cloud Support Portal. Equivalent to case, incident, or ticket.

Agenda

Support Portal – Engaging Support
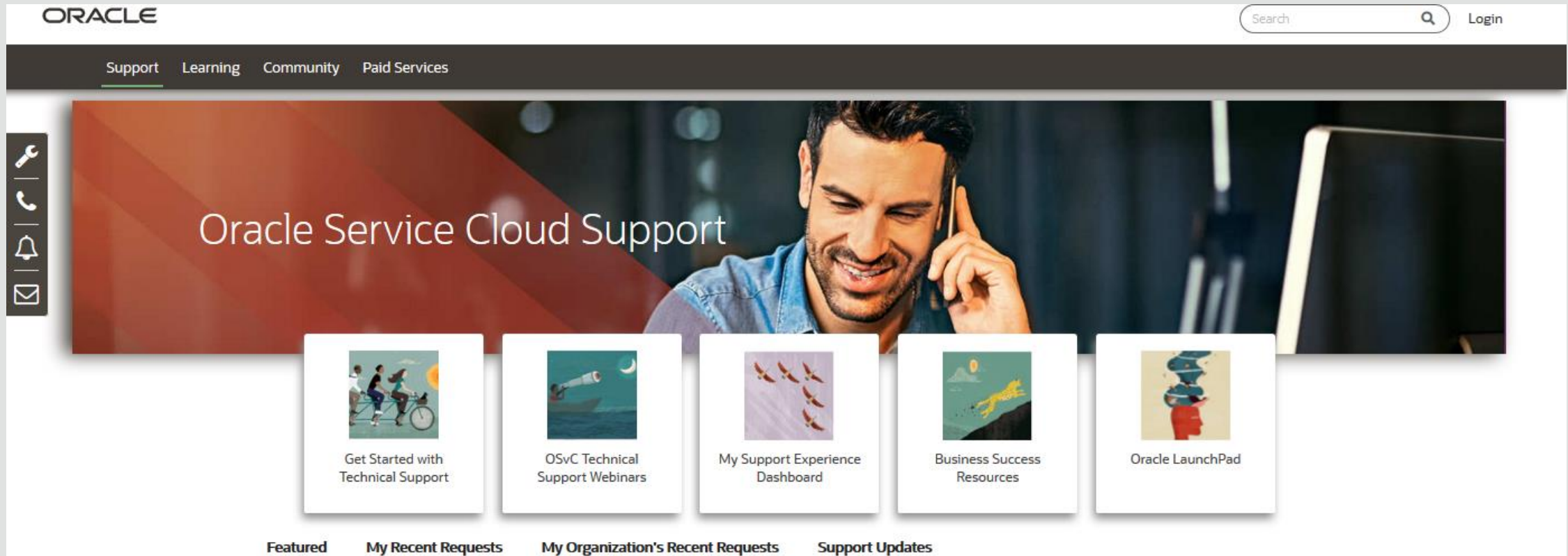
- OFS is part of the Oracle Service Cloud suite. Customers use the Service Cloud Support Portal to get support for the OFS product.

- The Portal is a comprehensive one stop shop for all support interaction, knowledge and community discussions and much more

- Link to Support Portal: **https://cx.rightnow.com**

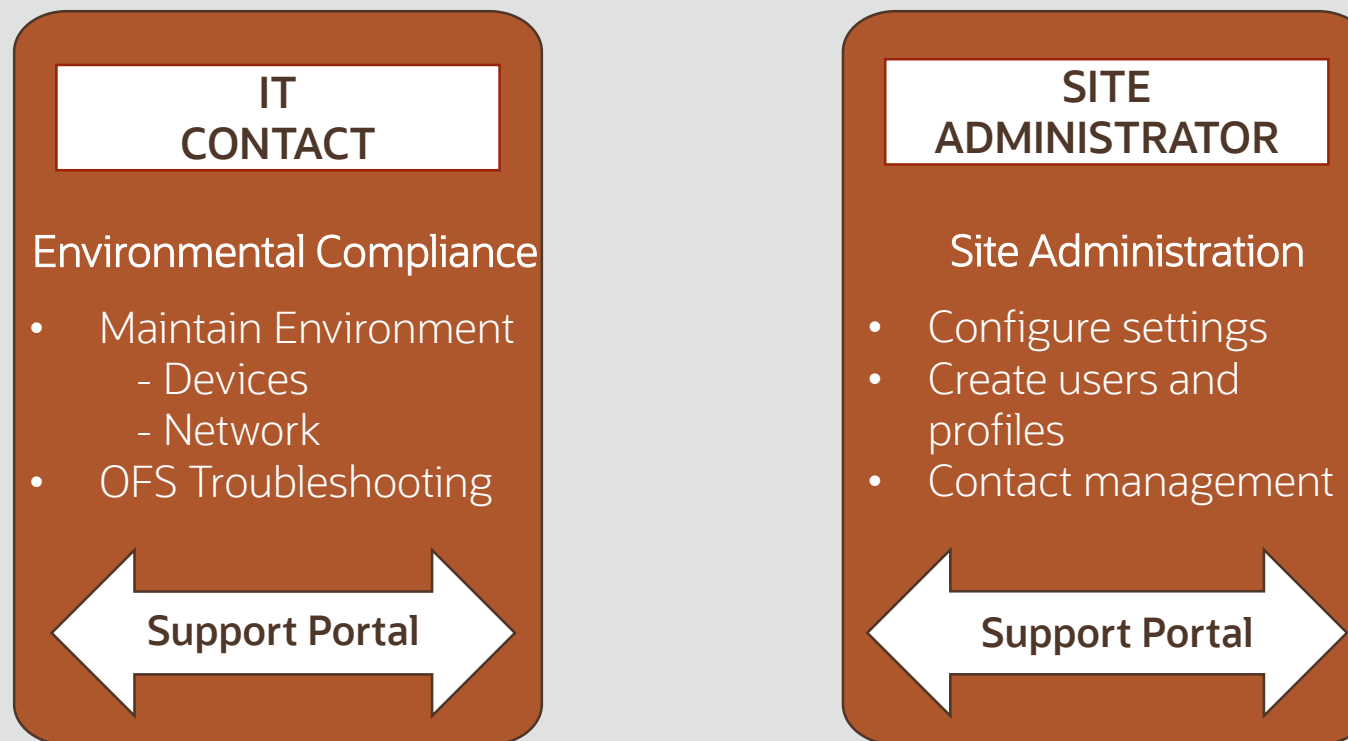# Support Portal – Engaging Support

Knowing your role, your responsibilities, and where to find appropriate trainings

- Primary Support Contacts (PCS) are the secured contacts who can request password resets for the Support Portal.

- Both Primary Support and Technical Contacts can log Service Requests and follow up with the Technical Support team.

- All customer contacts can search the Knowledge Base and utilize the Oracle Service Cloud Support Community.

- Primary Support or Technical Contacts engaging with Technical Support should be properly trained in the basic Oracle Field Service solution as well as knowledgeable with your business processes and solution set up.

Oracle University trainings, Support Portal (OSvC) Training, LaunchPad and Oracle Cloud Learning Subscription are highly recommended for Site Administrators and contacts who are enabled to submit Service Requests. Keep in mind, this is training for the Support Portal and not for OFS.

Support Portal – Maintaining Roles

Two roles vital to Support Portal success:

IT CONTACT

Environmental Compliance

- Maintain Environment
    - Devices
    - Network
- OFS Troubleshooting

Support Portal

SITE ADMINISTRATOR

Site Administration

- Configure settings
- Create users and profiles
- Contact management

Support Portal

It is highly recommended that Site Administrators be set as
Contact Type: Primary Support Contact with **Service Privileges: Manage Contacts.**

Support Portal – First Steps for Site Administrator

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The Technical Support Services Guide provides first steps to take upon being provisioned

Highlights from the guide

- Logging into the Support Portal
- Setting up your contacts
- Which Support resources to use for which questions
- The types of problems supported by our engineers
- How to search the Knowledge Base
- Submitting Service Requests

- When we're available and how to reach us
- Different Support Packages available
- Required Roles: IT Contact, Site Administrator
- Browser, Device and Networking requirements
- Hosting and Lifecycle policy
- Product training video modules

Our team updates this guide periodically and recommends that customers use it as a training supplement for new employees

Link to the Technical Support Services Guide: https://cx.rightnow.com/app/answers/detail/a_id/9698

Support Portal – First Steps for Site Administrator

Make Contact Management your first site task

For the **security of your site's customer data**, we cannot provide technical support to anyone who is not a Designated Contact, nor can we add contacts without a request via a service request. Therefore, it is in your best interest to keep this information current at all times.

As a customer, your responsibilities include:

- Setting up contacts
- Keeping the organization's contact list current
    - Contact privileges allow for adding and disabling contacts
    - By managing contacts you designate who in your organization may access the Support Portal and submit SR's
    - contact audit is recommended every 6 months

At least one of your contacts must have Manage Contact rights

- However, you should set up at least one back up in the event of an emergency
- Oracle recommends three contacts with Contact Management Privileges

Support Portal – First Steps for Site Administrator

Managing your contacts – Contact Types

First, Establish Key Support Contact Types

- Site Administrator will select from 3 different Contact Types
    - **Primary Support Contact**
        - Including back-up Primary Support Contacts
    - **Technical Contact**
    - **KB (Knowledge Base) Only**

- Newly created contacts will be emailed login credentials

- All contacts should update their Profile

- Customers own contact management responsibility

Support Portal – First Steps for Site Administrator

Managing your contacts – Service Privileges

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Manage Contacts

Designated Support Contact (SRs)

Community Access

Now, Assign Service Privileges to Contacts

- **Site Administrator will select from 3 different privilege types**
  - Manage Contacts
  - Designated Support Contact
  - Community Access

- **Privileges are hierarchical**

- **Typical Support Contact Type – Service Privilege Pairings**
  - Primary Support Contact – Manage Contacts
  - Technical Contact – Designated Support Contact
  - KB Only – Community Access

Support Portal – First Steps for Site Administrator

Accessing Contact Management

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You must be logged in to the Support Portal to access **Contact Management**:
http://cx.rightnow.com

Click on **Site Tools** in the upper right, followed by Contact Management Tool

From here, you will be able to add, disable and edit your organization's contacts.

More information can be found at:
https://cx.rightnow.com/app/answers/detail/a_id/1560
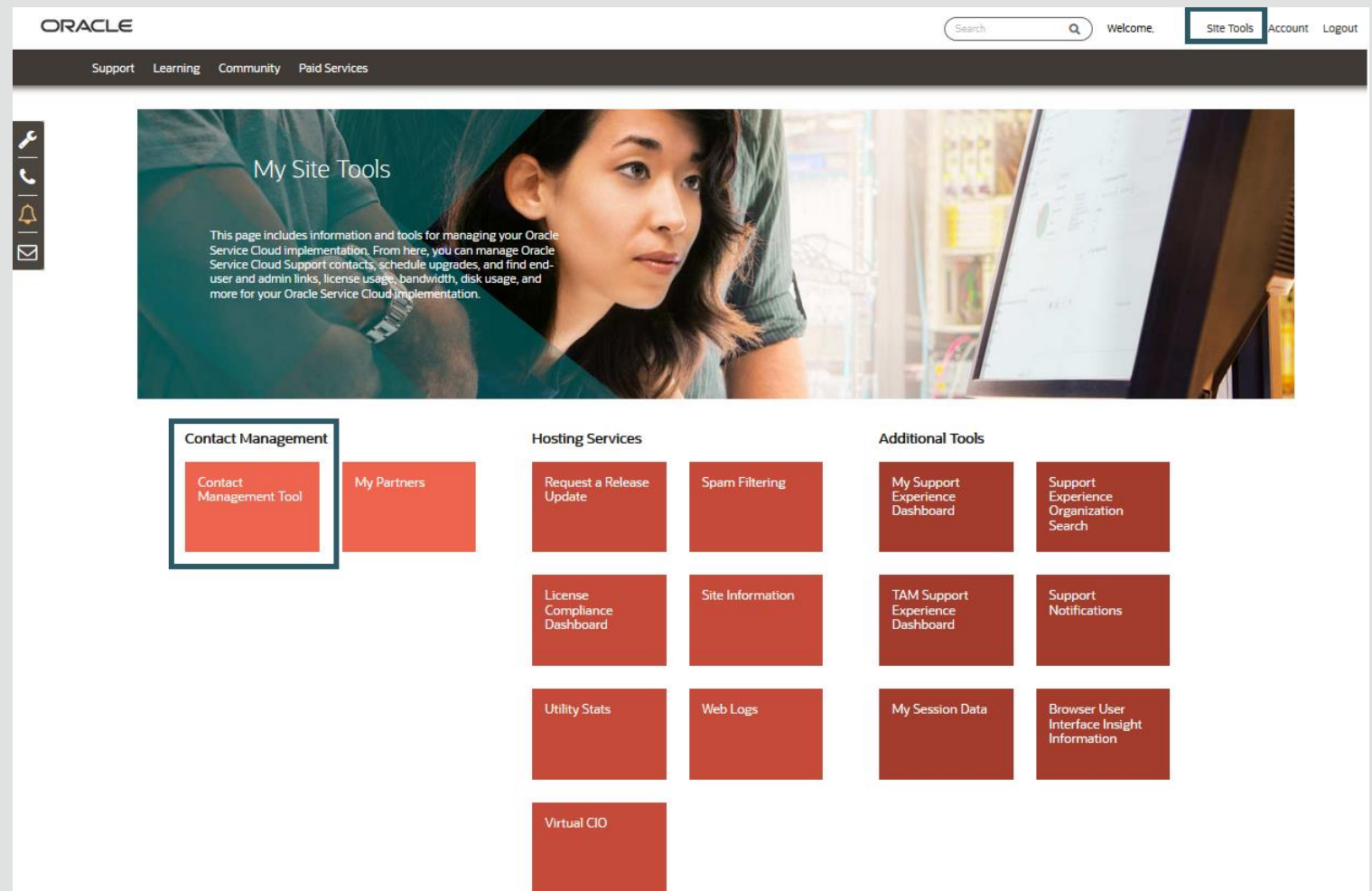
Support Portal

Frequently Asked Questions

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Q: An organization has not been created for me in the Support Portal and I have not received any welcome emails. Who can help?

Ask your Oracle Contact (Implementation, Account Manager or CSM) to contact OFS Support to have your organization created and a password sent. Typically it is created automatically during the provisioning process but sometimes issues can arise.

Q: I am a new customer and do not know who our site administrator is. How do I find out?

Ask someone who was involved with the provisioning of your services or your Oracle Contact to request that OFS support supply the name of the site administrator associated with your organization.

Support Portal

Frequently Asked Questions

Q: I am an existing customer and do not know who our site administrator is. How do I find out?

Open a non-technical SR at https://cx.rightnow.com/app/business/list asking who your site administrator is.

Q: My contact manager no longer works for us and no one can add a new user of ours to the portal. What should I do?

Create a SR with OFS Support at http://cx.rightnow.com requesting that the contact management profile be added to an existing user.

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1. Oracle Field Service Support - Terms and Acronyms
2. Engaging Support and using the Support Portal
3. **Oracle Field Service - Best Practices**
4. Oracle Field Service - Resources
5. Additional resources, links and policy documentation

Working effectively with Support - Best Practices

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When you have a question, need, or issue…

… the solution may already be available.

Search the Knowledge Base

Search - Find answers fast, search the **Knowledge Base** for a solution

Ask the Community

Visit **the Community** and seek answers from Oracle experts & industry peers or post a question **User Discussion Forum**

Submit a Service Request

Unable to locate a solution? Submit a **Service Request** through the Support Portal

Working effectively with Support - Best Practices

Using the Knowledge Base (**https://cx.rightnow.com/app/answers/list**)

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- To search type keyword(s) into highlighted box and click search or hit return

- Answers appear in the box below

- Search to find answers regarding "how to" configure, customize, or create, etc.

- You can also search product documentation, product tutorials and in product contextual help.

Optimizing SR Time to Resolution

Key inhibitors to SR resolution

SR Quality

- Select the correct Product
- Submit details to help us find the issue
- Steps to reproduce or tell us it's not reproducible or intermittent
- Describe business impact (who, how many, $$$)
- Error messages
- Trace routes
- Soap/REST logs (request/response)

False Start Prevention

- Ensure SR has enough information so as to minimize back and forth
- Ensure customers submit SRs, rather than internal "submit on behalf of" (These are not accepted)

Correct Severity

- Ensure SR severity is set to align with impact to the business

SR Quality

False Start Prevention

Corrective Severity

Expedient Resolution
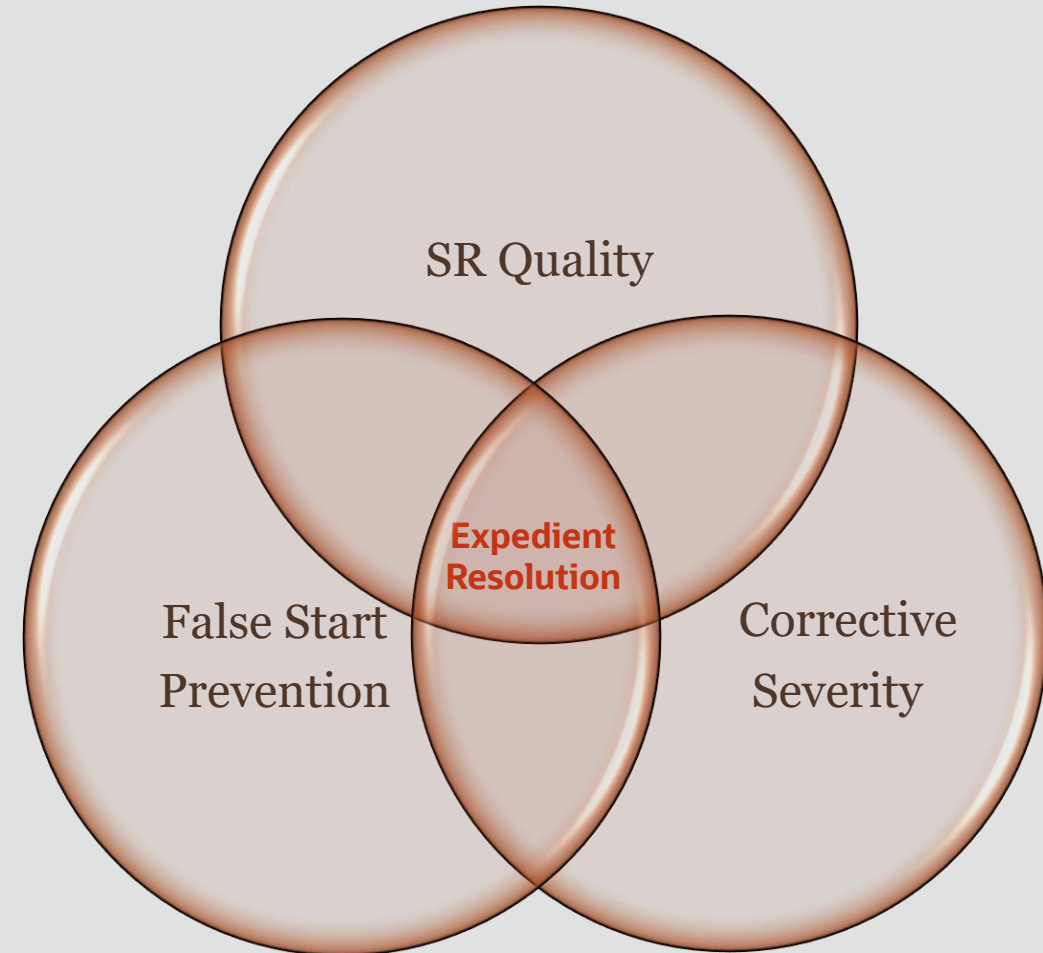
SR Filing Process – Optimizing Service Request Submittals

The importance of selecting appropriate Product, Site and Interface

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Customers can significantly cut down on SR resolution times by carefully making proper selections at the outset of a Service Request.

- Make sure you select the 'Ask Support about Oracle Field Service' tab

- Select the correct product module according to your issue

Working Effectively with Support – Routing Best Practices

Submitting routing-related issues

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- All routing-related issues must be submitted with:
  - Date and bucket in which routing was run
  - Routing Run ID
  - Expected vs. Observed Behavior

- It's important to remember that routing runs should not be analyzed on a route-by-route or job-by-job basis. The routing engine works holistically to provide the most optimal route. **Support will not analyze single route or job placement complaints.**

- Support's role is to analyze and verify that there are no routing errors or issues observed with the module.

- Support will not alter routing settings for expectation-based requests. These would need consultative engagements.

Monitoring Service Requests

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Important Statuses that will require your action

'WAITING'

- When we've responded to your SR you and all cc'd parties will be notified by email.
- If you take an extended period of time to respond or provide information, it sends the Support Engineer an implicit message about the problem urgency which may not match the Service Request priority.
- If the status is not changing or if you are not getting responses back within an acceptable period of time, you may always call the Support Hotline to speak with a Manager.

Oracle Service Cloud Support Portal – Key SR Status

SR Status	Description
Waiting	Oracle Support is waiting for you to update the Service Request.
Unresolved	Oracle Support is working the Service Request.
Solved	The SR is closed and will no longer be worked on.

Working effectively with Support – Best Practices

Solving the Issue

- We will close the SR after attempting to get your consent at least 3 times.

- Auto-closure occurs after 3 attempts if the solution is not dependent on Oracle.

- If the issue is a product defect, Support will guide you through its resolution.

- Reopen rates are very low. We measure this to ensure that we are not closing issues prematurely.

Working effectively with Support – Best Practices

What you should expect from Oracle Support

- Our Support Team is the face of Oracle and your voice within Oracle

- Your Support Engineer will work, coordinate, and collaborate with any and all internal teams including Cloud Operations and Product Development, if and as needed, to resolve your issue

- Expect a timely initial response based on the severity of your issue

- Expect your Support Engineer to communicate our 5 W's
    - What have they done? Why?
    - What are they going to do next? Why?
    - When should you expect to hear back from Support?

- Expect your SR to always be properly documented in details at all times

- Expect that an Oracle employee never asks or has a contact record on your production site.

Working a Service Request Effectively

Improve results and expedite outcome

- Monitor changes in SR status and severity

- Documentation is essential
    - Provide detailed and timely responses to all questions
    - Ensure there is an action plan after each update and determine who owns each action
    - Minimize Service Request 'tag' or 'pinging' by ensuring you provide information requested or an explanation of why it may not be possible to provide it

- Request phone calls as appropriate

- Request collaborative screen-sharing support sessions as appropriate

- Change the severity level when appropriate

- Engage Support management if necessary

Engaging Support Management

Bringing Management Attention to a Service Request

- A customer can engage Support Management on any SR to
  - Communicate an important business issue to Support management
  - Report a critical showstopper to implementation or upgrade plan
  - Express dissatisfaction with the resolution or response to a SR

- Call support hotline - Must have SR # and be a verified designated support contact

- Engagement is a collaborative process and yields:
  - Management contact
  - Action Plan
  - Communication Plan

- You can help by judiciously selecting the severity and by telling us the correct milestone dates

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Working effectively with Support – Providing Feedback

Your feedback is key to improving our Support Team

<u>**You can provide feedback to us in two main ways:**</u>

- **Closed Service Request Survey**

  - When a SR is closed, the contact of record will received a survey asking about your experience with Technical Support.

  - Although the survey takes time, your responses are invaluable to the improvement of our team. Please take the time to respond.

  - The results of these surveys are reviewed each month by both executive and team management.

- **Support Experience Feedback Mailbox**

  - osvc_support_feedback@custhelp.com is an actively monitored mailbox intended for any type of feedback customer's want to provide.

  - Customers can find a link to the mailbox on the Support Experience Page which can be navigated to via the "Support & Services" dropdown menu on our Support Portal.

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Dear Marion,

Thank you for your recent request for assistance on incident 200327, closed on 03/27/2020 07:46 AM.

Quality customer care is very important to us. Please take a moment to let us know how we did.

Please rate your satisfaction with the handling of this particular Service Request. (*You must answer this question to continue.)

| Not At All Satisfied | | | | | | | | Extremely Satisfied | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Do you consider this issue resolved?
○ Yes
○ No

Continue

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Working effectively with Support – Platinum Support

Service	Description
Online Case Submission	File a ticket issue via Support Portal
Phone Support	Reach a Support Engineer via phone to submit a SR
Live Chat Channel	Use IM to communicate with Technical Support
Severity 1 issues 24 x 7 Coverage	We provide coverage for Severity 1 issues 24 x 7
Specialized Implementation Support	Named Support Engineer reviews any issues during implementation
Standard SR Dashboard	Online view of outstanding and historical support requests
Proactive SR Health Monitoring	Proactive escalation prevention by watching thresholds
Business Advisory Services	Ask non-technical questions via Business Success Resources; Participate in community for best practices; Proactive account monitoring; Proactive lifecycle management; Success Planning Tools
Education Services	On-demand 24 x 7 Digital Training; Guided Learning – Starter Pack; Cloud Quick Start – Live Events

Working effectively with Support – Oracle Platinum Support

Severity Levels and Business Impact

Severity Level	Business Impact Technical Impact	Oracle's 1st Response	Update Frequency	Partnership
				Resolution Time
1	Mission Critical Business Impact	< 15 minutes 24 x 7	Updated 24x7 until resolution	Co-Owned
2	Serious Business Impact	< 2 hours – Local time	Updates daily until resolution	Co-Owned
3	Minor Business Impact	< 3 hours – Business hours	Updates every 3 days	Co-Owned
4	No Business Impact	< 8 hours – Business hours	Updates every 3 days	Co-Owned

- 75% of the Sev 1 Non-Bugged SR's get closed in <5 days and 91% are closed in <14 days
- 80% of the Sev 2 Non-Bugged SR's get closed in <14 days

Oracle Cloud Support Details: http://www.oracle.com/us/corporate/contracts/ocloud-hosting-delivery-policies-3089853.pdf
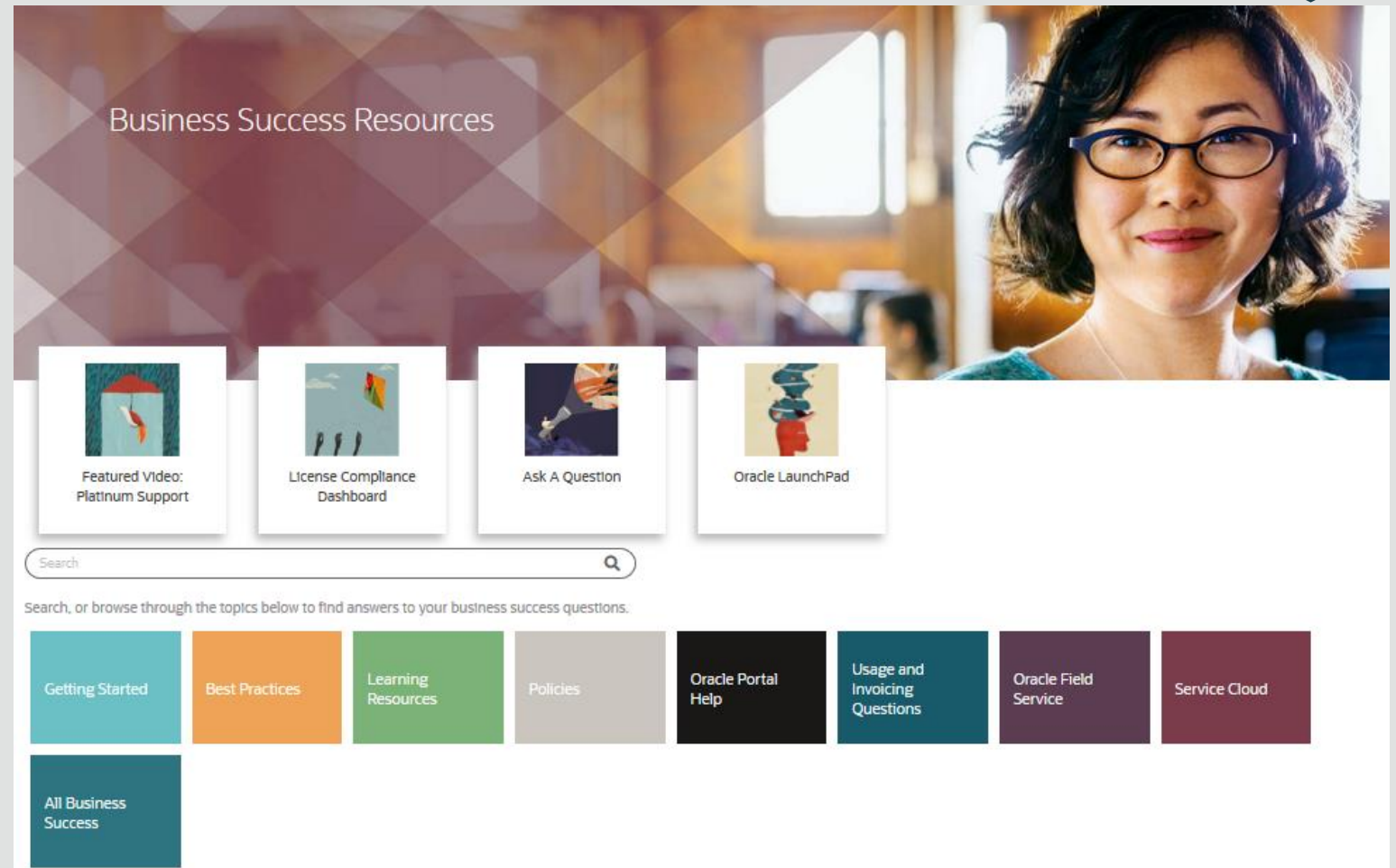
Business Success Resources

Access to business support to quickly and easily find the information you need

- Submit a non-technical question using 'Ask a Question'
- Search our knowledgebase
- Access Oracle LaunchPad
- View License Compliance Dashboard

Link: https://cx.rightnow.com/app/business/list

Working effectively with Support – The TAM Role

Customers have the option of purchasing a Technical Account Manager

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Features	Benefits

- Personalized knowledge of Customer's technical and product environments

- Coordinates a virtual team of Oracle Field Service Support & Operations to resolve critical Service Requests

- Delivers regular proactive support reviews to assess response against best practices

- Single Point of Contact

- Faster Response

- Reduced Resolution Times

- Customer Advocacy

Working effectively with Support – The Role of Oracle Consulting Services (OCS)

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When OCS should be engaged

- Product training and personalized assistance
- Routing optimization
- Large configuration changes which need planning, analysis, and testing
- Support will inform you if a situation falls under the need for potential consultative engagements

How to engage

- Support will be able to provide you an Oracle contact to further discuss consultative engagements.

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Typical points of contact

Client Need	First Point of Contact	Supporting Service Cloud Staff	Additional Resources
My issue isn't being worked fast enough.	Call Support and ask to speak to a manager	• Product Support Managers • Director of Support • TAM (if purchased)	• cx.rightnow.com
I don't like the answer Support gave me.	Ask to be transferred to a manager	• Product Support Managers • Director • TAM (if purchased)	• Communities/Forums • cx.rightnow.com • Documentation
Something isn't working quite right.	Knowledge base	• Technical Account Manager • Product Support	• cx.rightnow.com • Communities/Forums • Documentation
I bought something and haven't gotten it yet.	Sales/CSM	• Sales/CSM	• Submit a non-technical SR
I have a question, but am not sure whom to call.	Knowledge base	• Support	• cx.rightnow.com • Communities/Forums
I want to know how to change something in Oracle Field Service.	Knowledge base Documentation Communities Oracle Consulting Services/ Outsourced Partner	• TAM (if purchased) • Project Team – OCS or Partner	• cx.rightnow.com • Communities/Forums • Documentation

Product training – Oracle LaunchPad
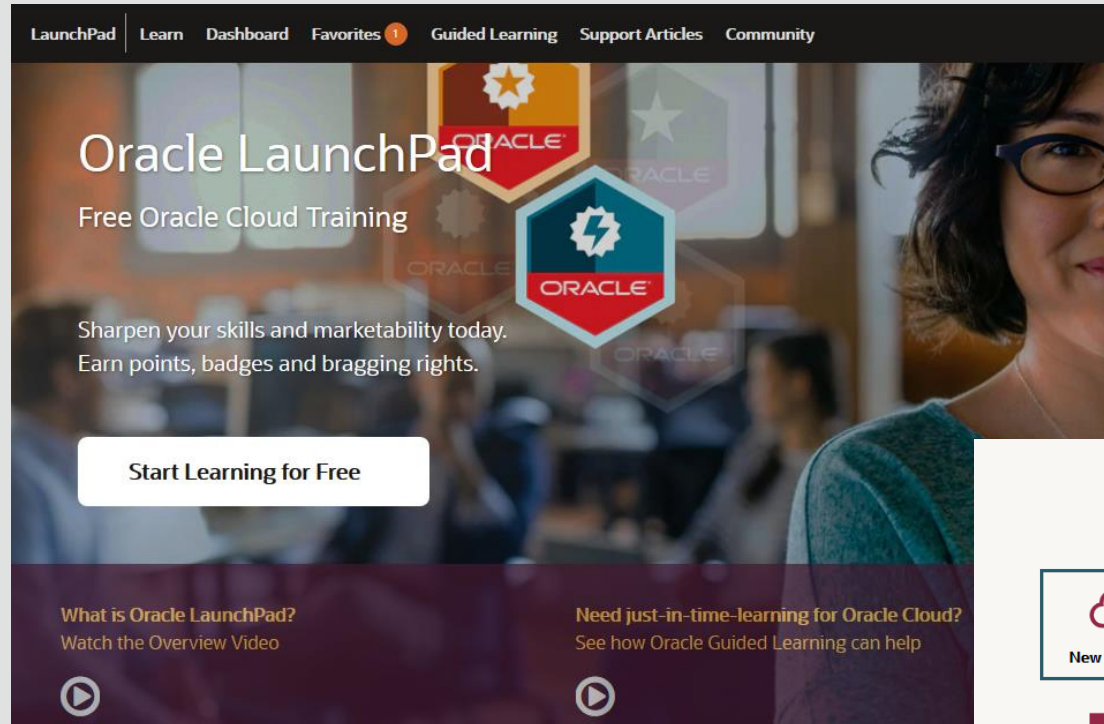
- New Features
  - Review all the new updates made to various areas of OFS

- Customer Experience
  - Introduction of many of the main management screens found in OFS

Link: https://learn.oracle.com/launchpad
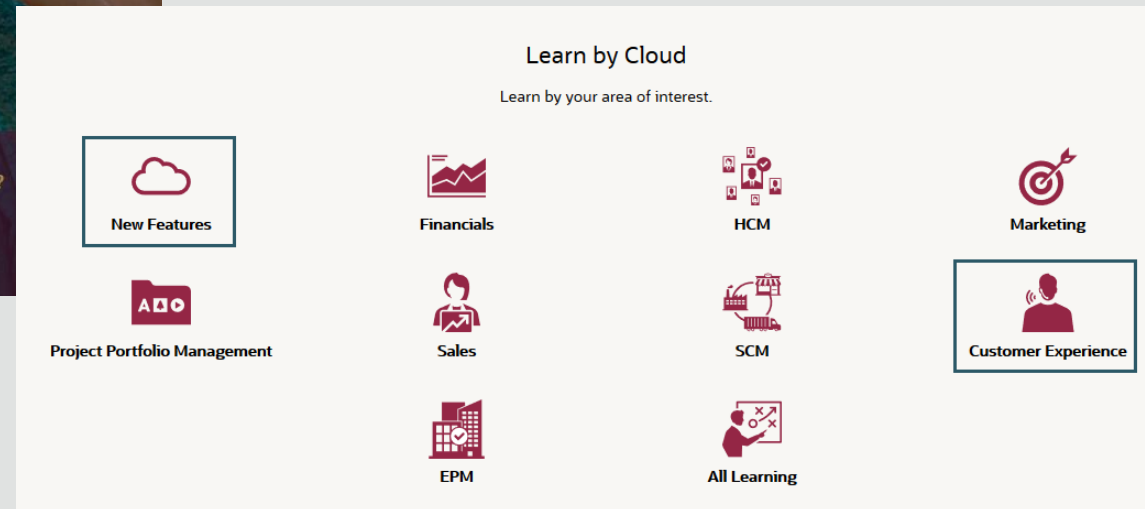
Product training – Learning Subscription

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- **Watch recorded sessions on how to implement OFS taught by top Oracle Instructor**
  - On Demand courses – anytime, anywhere
  - Get familiar with capabilities and configuration options available in Oracle Field Service
- **Become a Certified Field Service Implementer**

Link: https://learn.oracle.com/ols/user-portal
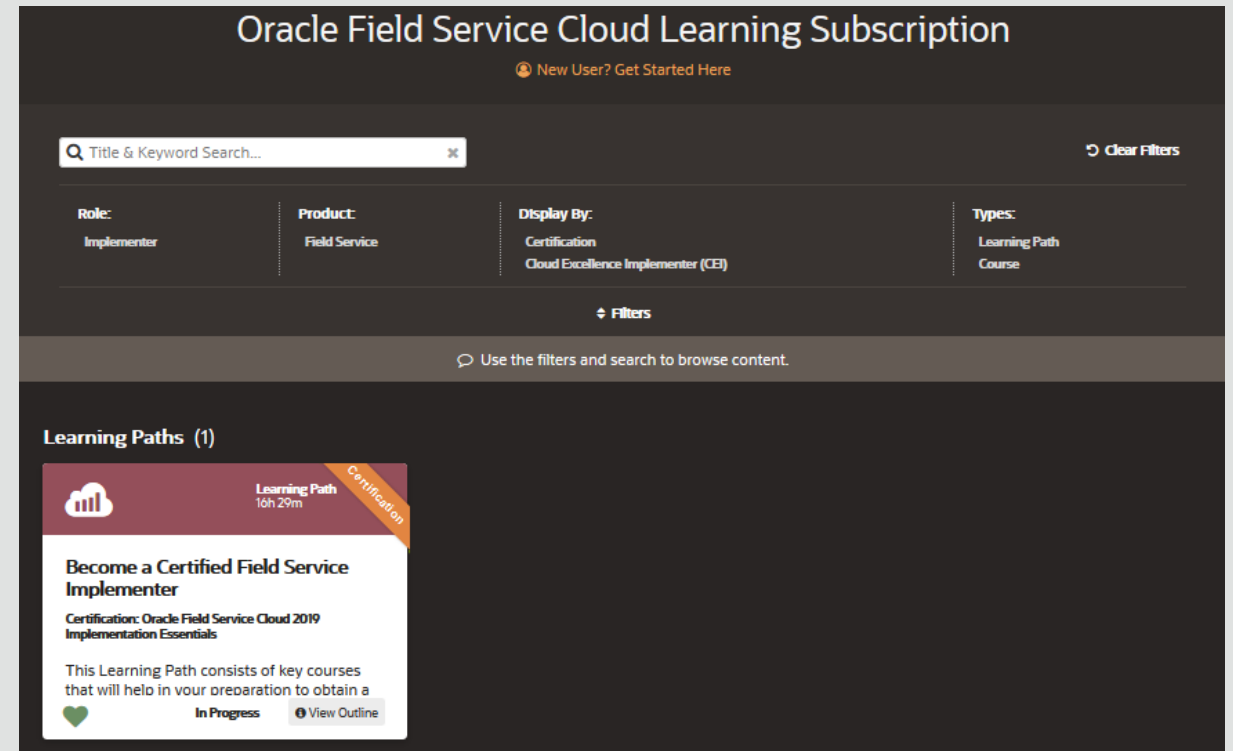
Product training – CX Knowledge Base
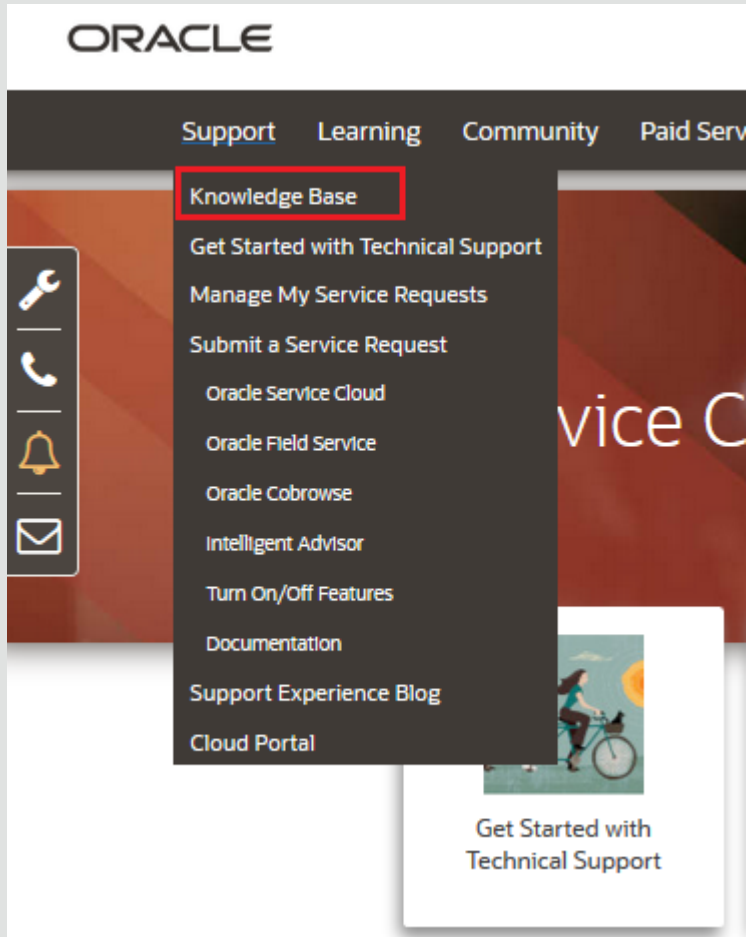
- Instructions on how to resolve common configuration issues

- FAQ - common topics and announcements

- Oracle Field Service translated Answers available

    Link: https://cx.rightnow.com
    Link: https://cx-pt.custhelp.com/
    Link: https://cx-sp.custhelp.com/

Root Cause Analysis (RCA)
https://cx.rightnow.com/app/answers/detail/a_id/9284

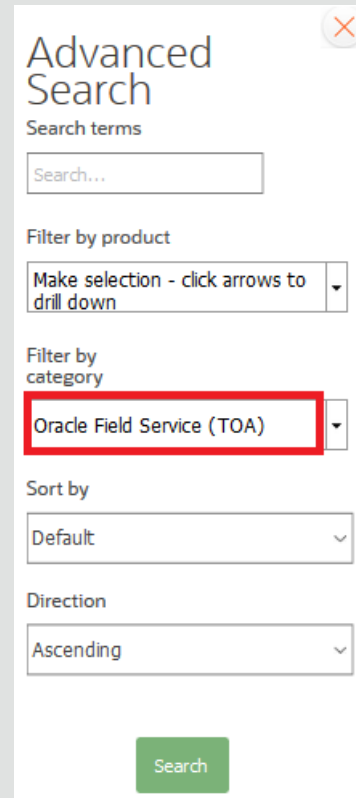- **Root Cause Analysis (RCA)**

    - Effective and timely communication for OFS customers
    - In depth insight into service outages or degradations with transparency
    - Proactively provided to customers
    - Available for production environments

- **Information from root cause analysis on specific service outages or performance degradation**

- **Detailed information fulfilling an organization's requirements to understand the causes of the problem and the corrective actions to prevent recurrence**

Types of Root Cause Analysis

Pre-RCA:

- Typically created soon after the event is closed and contains information on initial findings and event timeline
- Brief event narrative
- Type of event (unplanned, performance degradation, or other)
- Event timeline including impact start and service restored time
- Services impacted
- Affected applications and systems

Detailed RCA:

- Typically created days after the event is closed and Oracle performs complete technical investigation of the event.
- Detailed event narrative
- Type of event (unplanned, performance degradation, or other)
- Event timeline including impact start and service restored time
- Services impacted
- Affected applications and systems
- Root cause analysis (RCA)
- Impacted and involved parties
- Corrective actions and corrective actions timeline

Entitlement for Preliminary RCA

- Performance degradation
  - Short-lived, but recurring or persistent issues
  - Service performance degradation that lasts more than 15 minutes

- Unplanned outages
  - Impact in the Oracle Cloud production environment, lasting more than 15 minutes
  - Issue that prevents Oracle Cloud Ops from fulfilling customer SLA requirements
  - Third-party system outages, such as load balancer issues, which last more than 15 minutes Note: This does not include third party products outside Oracle Cloud. For example, social networking sites integrating with Oracle Social Cloud Services

- Others
  - Maintenance windows that last longer than the projected duration
  - Partial service failure events that last more than 15 minutes

Entitlement for Detailed RCA

- Unplanned outages
  - Impact to cloud production only environment(s) or service(s) where not available or not accessible for longer than 1 hour

- The following events typically do not qualify for the RCA:
  - Restart operations requested by the customer
  - Issues concerning unsupported versions of a Cloud service
  - Issues with documented fixes on newer versions
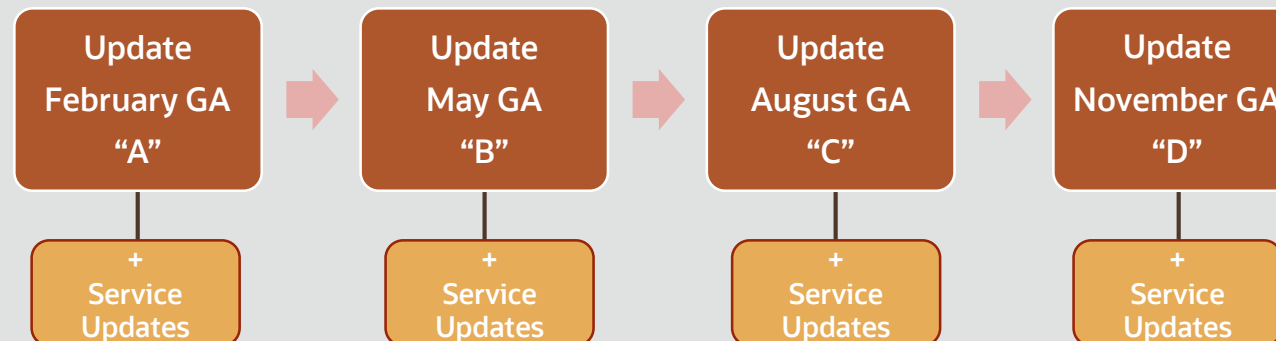 - Outages caused by a customer

Oracle Cloud customers can still request a Detailed RCA via SR (Service Request) for the events that meets the entitlement criteria outlined for the Preliminary RCA. In this case customers will receive the Detailed RCA via Cloud Portal.

Release & Upgrade Policy

https://cx.rightnow.com/app/answers/detail/a_id/8509/

- **Visit the policy above to view the entire OFS Release policy**

  - The Oracle Field Service Release Process is designed to allow customers to take advantage of the latest product features, enhancements and fixes, and to facilitate high-level system performance, quality, stability and security.

  - Oracle Field Service is automatically updated so that customers receive these benefits along with up-to-date product capabilities and guaranteed support.

  - There are two types of system releases:
    - **Update** - introduces new features and functionality
    - **Service Update** - contains problem fixes and are released as needed

Update February GA "A"	→	Update May GA "B"	→	Update August GA "C"	→	Update November GA "D"
+ Service Updates		+ Service Updates		+ Service Updates		+ Service Updates

Device & Browser Policy

What to expect from Support

https://cx.rightnow.com/app/answers/detail/a_id/8415/

- **Visit the policy above to view the list of supported browsers and devices**
  - Using a supported browser and device means Oracle is dedicated to address all issues and defects found within them

  - While not all browsers and devices are listed in our policy, we expect that our service will work in all types of browsers and devices

- **What will happen if you are using an unsupported browser or device?**
  - Support will work with the customer to drive them towards using a supported setup

  - Support will try to reproduce the reported issues on a supported set up to isolate the issue with a specific browser or device

  - If you are using an unsupported browser or device, **this does not mean Support will reject your request.** Given the business impact of the issue, Oracle will provide a reasonable effort to fix any reported issues.

Technical Support and Cloud Service Policies

Oracle Service Cloud product documentation and Cloud Operations Policies

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Policy	Location
Oracle Service Cloud Technical Support Services Guide (includes other Service Cloud products)	https://cx.rightnow.com/app/answers/detail/a_id/2543
OFS Release Process	https://cx.rightnow.com/app/answers/detail/a_id/8509/
Oracle Field Service Browser and Device Policy	https://cx.rightnow.com/app/answers/detail/a_id/8415/
Oracle Cloud Enterprise Hosting and Delivery Policies	https://cx.rightnow.com/app/answers/detail/a_id/7225/kw/7225
Oracle Global Customer Support Security Practices	http://www.oracle.com/us/support/library/customer-support-security-practices-069170.pdf
OFS User Documentation , Guides, and Release Notes	https://cx.rightnow.com/app/answers/detail/a_id/8215 https://docs.oracle.com/en/cloud/saas/
OFS Instance Cloning Policy	https://cx.rightnow.com/app/answers/detail/a_id/8500/
OFS Root Cause Analysis Process	https://cx.rightnow.com/app/answers/detail/a_id/9284